LMCRMOutbound

User Manual

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1 Introduction

LMCRMOutbound is a DotNetNuke module used by a company to interact with client (or potential client) to promote its activities. It traces all contact (by telephone, by e-mail, etc. etc.) between company and clients.
Module needs a license key to work. This key has to insert in setting page.

2 Description

LMCRMOutbound has two main functionality:

- Creation of a list of names (prospect) from a list of potential company / person / 'commercial activities' that are interested to services made available by company owner of the module.
- Creation of campaigns advertising to be addressed to client or prospects, according to specific rules decided by a supervisor user.

Two tasks are composed by a few steps.

About creation of prospect:

1. Prospect info insertion (by an operator user or by prospect itself through a specific view);
2. Association between prospect and a specific marketing operator (of company owner of the module).
3. Marketing operators inform prospect about campaign or commercial offer.
4. Eventually a prospect can turn into client.
5. Possible reiteration of step 3 to call prospects who have not previously responded or who have given consent to be contacted.

About campaign publication:

1. Entering of campaign info by supervisor user.
2. Operator users call prospects / clients satisfying campaign requests.

3 View

Screenshots below refers to pages as seen by a user supervisor.
Supervisor and Operator users see similar views. Differences are described in 'User Roles' paragraph.

3.1 Campaigns

To access customer page and to all sub-pages, click **Campaign** link:

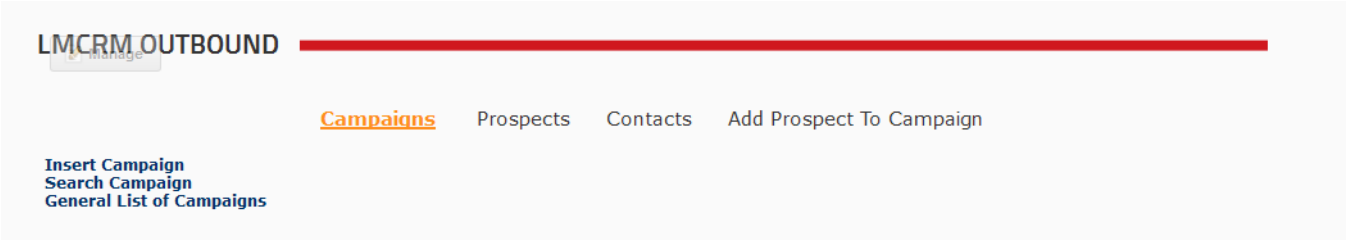

Figure 1: Campaigns

Use left side link to access to one of three sub-pages: 'Insert Campaign', 'Search Campaign' and 'General List of Campaign'.

3.1.1 Insert Campaign

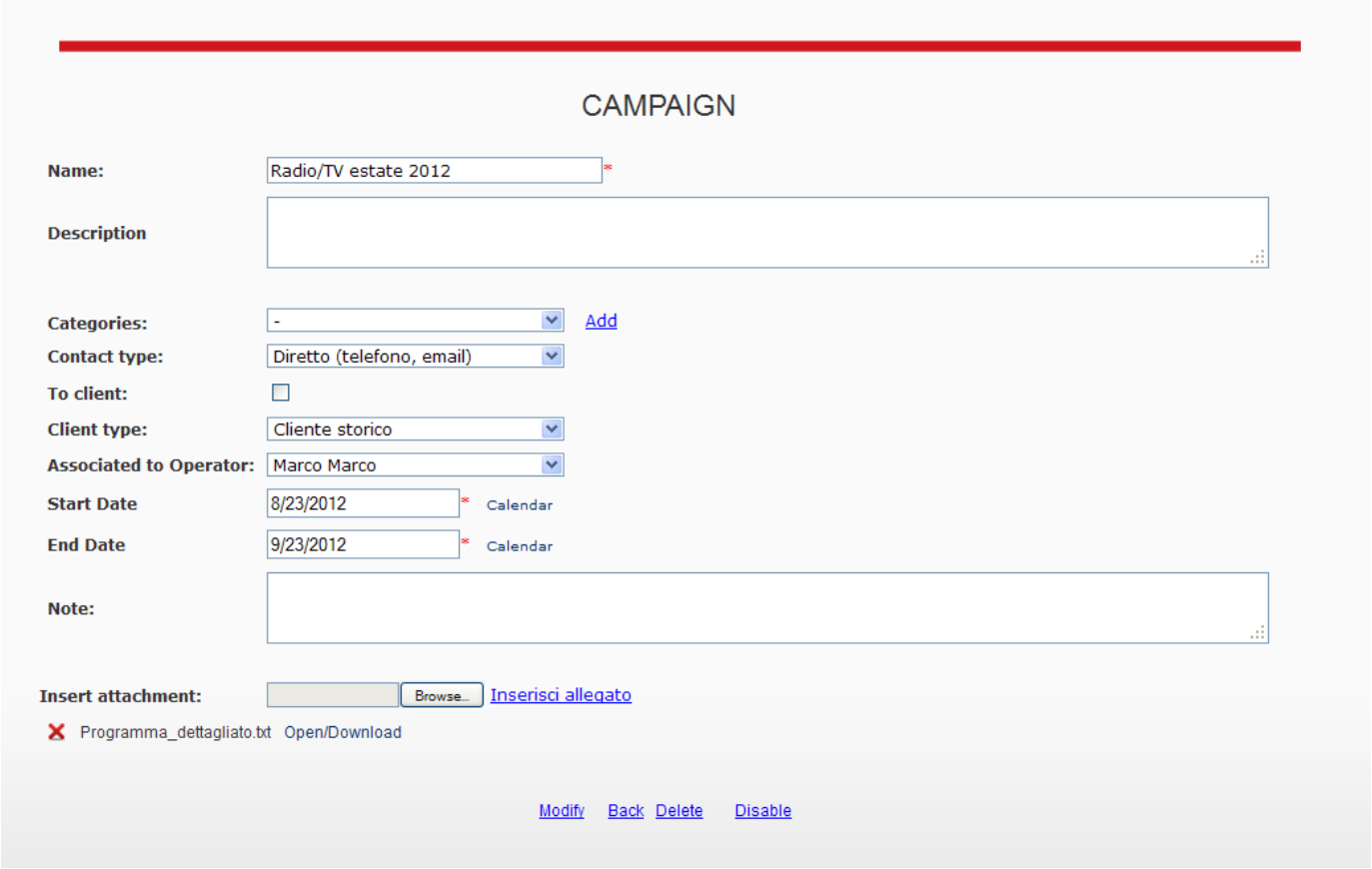

Figure 2: Insert a campaign

In insert field above I can specify campaign rules:

- General information about campaign (*Name*, *Description*)
- *Categories* (more than one)
- *Contact type*: Modality to contact a customer (example an operator can contact a customer by e-mail, direct contact, telephone, etc. etc.)
- *To Client:* if checked campaign is addressed to clients, otherwise to potential clients (prospects).
- *Client type* (example potential client, new client, etc. etc.)
- *Associated to Operator* that eventually manages campaign info.
- *Start Date, End Date*: campaign insertion and expired date.
- *Note.*
- *Insert Attachment*: files can be inserted only after campaign insertion. Allowed extensions are defined in module Settings.

3.1.2 Search campaigns

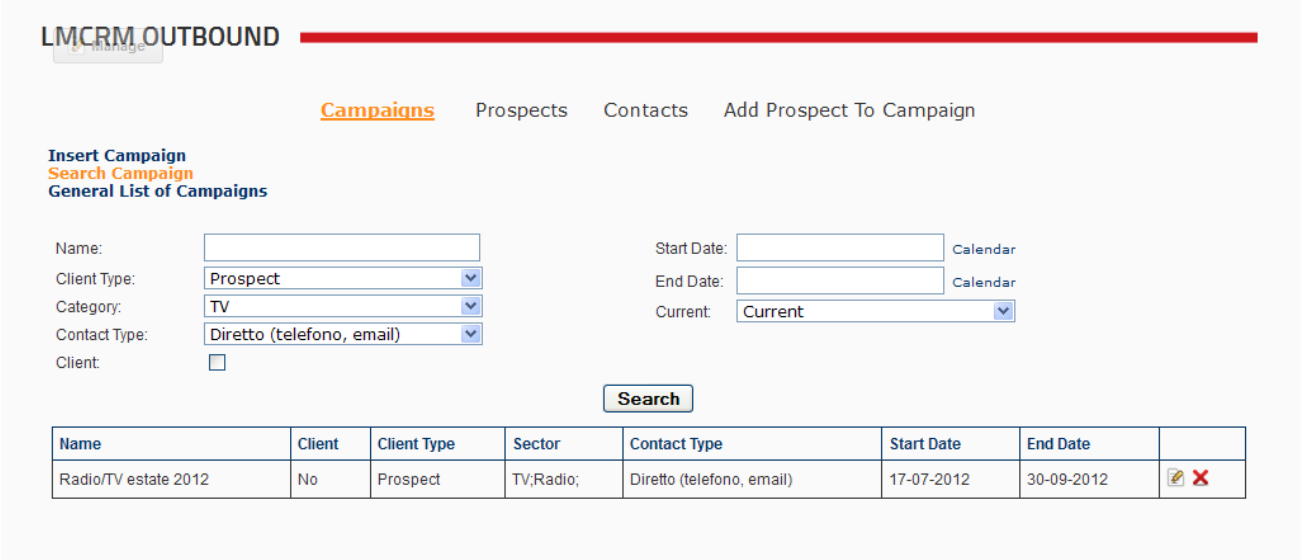

Figure 3: Search Campaign

This view permits to filter campaigns. Each search fields are described below.
- Campaign *Name*.
- *Client type* (example potential client, new client, etc. etc.)
- *Category*: select all campaigns for which at least one category (sector) is equal to specified category.
- *Client:* if checked search campaigns that are addressed to clients, otherwise to potential clients (prospects).
- *Start Date, End Date*: show campaigns valid at least one day between *start date* and *end date*.
- *Current*: show expired or current campaign.

Buttons on the right side of the table permit to modify/delete selected campaign.

3.1.3 General List of Campaigns

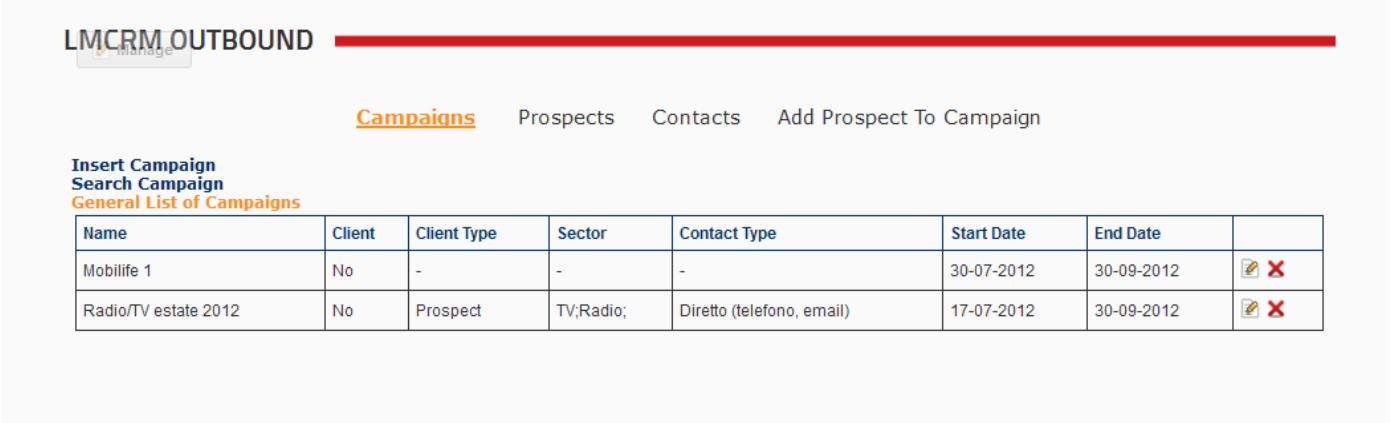

Figure 4: General List of Campaigns

Supervisor users see all campaigns, operator users see only campaigns associated to him.
Buttons on the right side of each row permits to modify/delete a specific campaigns.

3.2 Prospect

To access to prospect view with all sub-views, click ‘Prospect’ link in top menu:

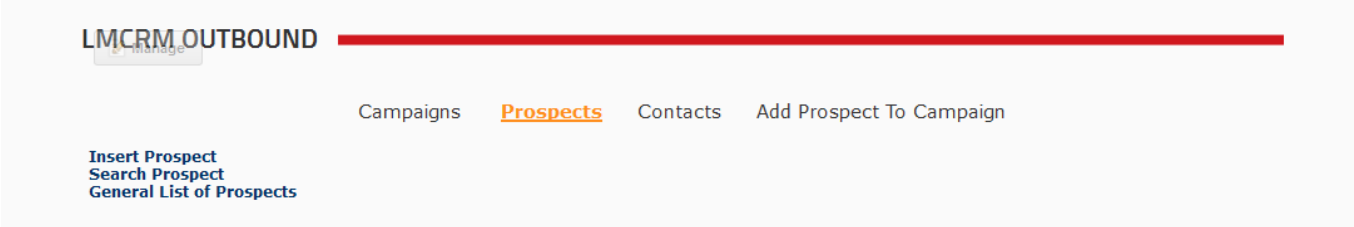

Figure 5: Prospect

As you see, links on left side permit to access to three sub-view: ‘Insert Prospect’, ‘Search Prospect’ and ‘General List of Prospects’.

3.2.1 Insert Prospect

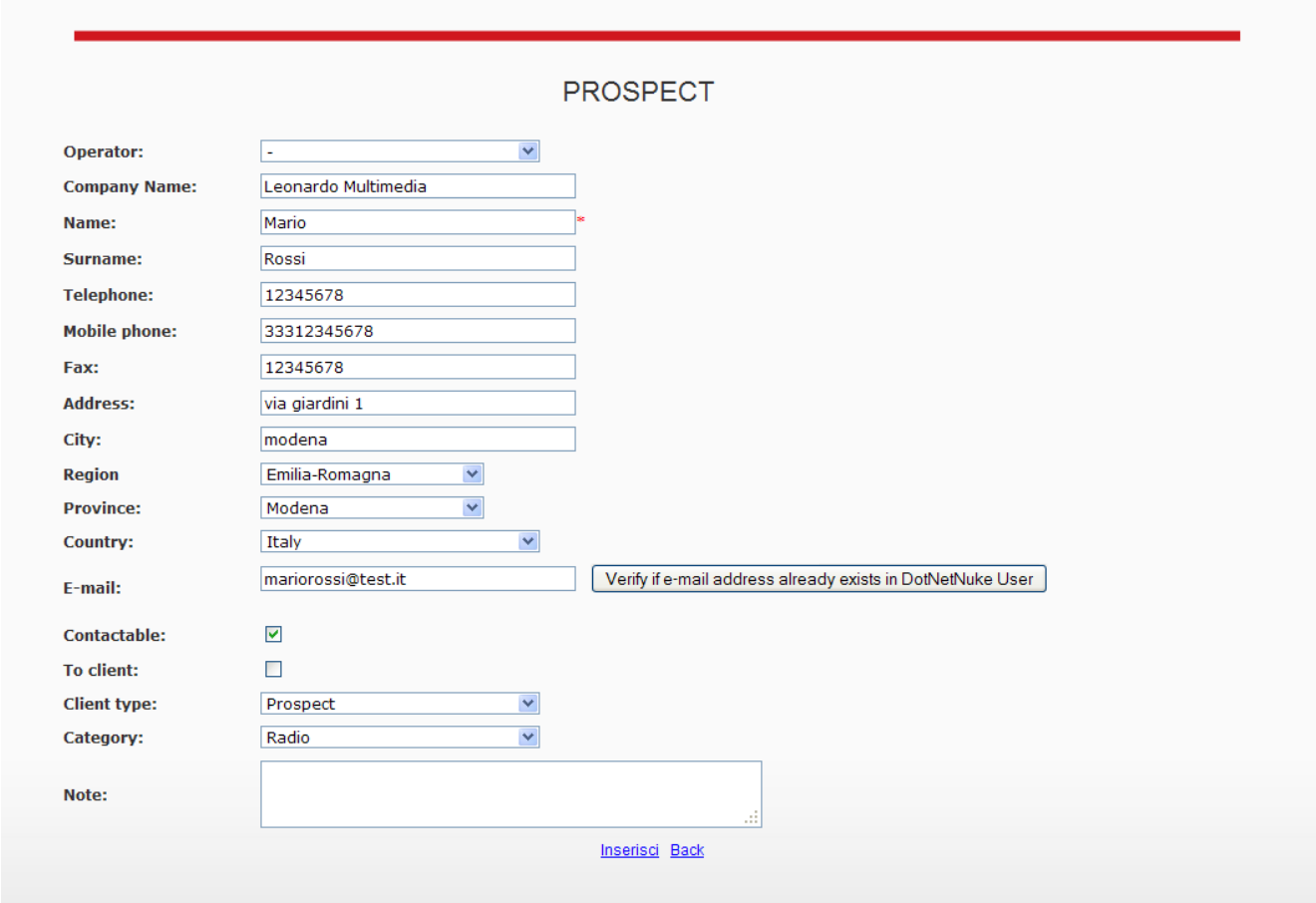

Figure 6: Insert prospect/client

This view permits to insert a prospect.
Only 'name' is mandatory.
Supervisor users can associate an operator to a prospect, in this case specified operator can manage prospect and contact him in relation to a campaign.

'Verify if e-mail address already exists in DotNetNuke User' link permits to verify if a DotNetNuke user with specified e-mail address already exists. If so, supervisor or operator users can fill campaign fields with DotNetNuke user profile fields.
Contactable: check it if prospect can be contacted.
To Client: check it if prospect is already a client.
At last, I can specify client type and associate to him a category (also named sector)

3.2.2 Search prospect/client

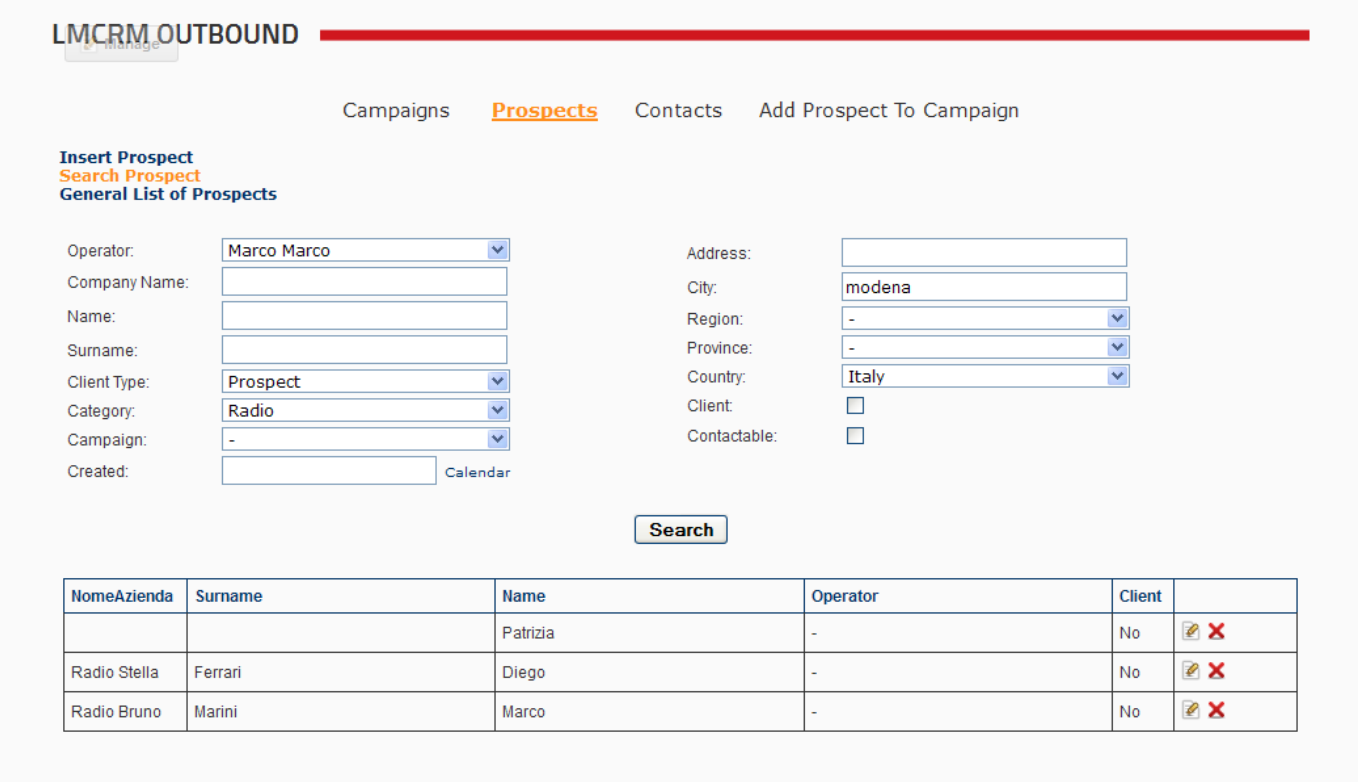

Figura 7: Search Prospect

This view permits to search between prospects. Each search fields are described below.

- *Operator* associated to prospect.
- General information about prospect (*company name, name, surname, address*, etc. etc.)
- *Client type* (example potential client, new client, etc. etc.)
- *Category*: sector associated to prospect.
- *Campaign*: selecting a campaign from the list, search field will be filled with campaign info, so search results are not users associated to campaign but prospects satisfying campaigns criteria. In other words this field is useful to have a rough idea about which prospects will be associated to a campaign.
- *Created:* search prospects created after specified date.
- *Contactable:* check it to select only prospect that can be contacted for a campaign.
- *Client:* check it to search prospects that are already client.

Buttons on the last columns of the table permit to modify/delete selected prospect.

3.2.3 General List of prospect/client

NomeAzienda	Surname	Name	Operator	Client	
		Patrizia	-	No	
TV qui		Patrizia	-	No	
	Botti	Giovanni	-	No	
Radio Stella	Ferrari	Diego	-	No	
fvf	fff	fff	-	No	
Radio Bruno	Marini	Marco	-	No	

Figure 8: General List of Prospects

Supervisor users see all prospects, operator users see only prospects associated to him. Buttons on the last columns of the table permit to modify/delete selected prospect.

3.3 Contacts

Following views permit to manage contacts with client (or potential client), insert new contact, modifying existing contact, search contacts, show all contacts made for a specific campaign.

To access contact view with all sub-views, click '**Contact**' link in top menu:

As you see, links on left side permit to access two sub-view:
'Insert new contact / Contacts Archive', 'Search Contact'.

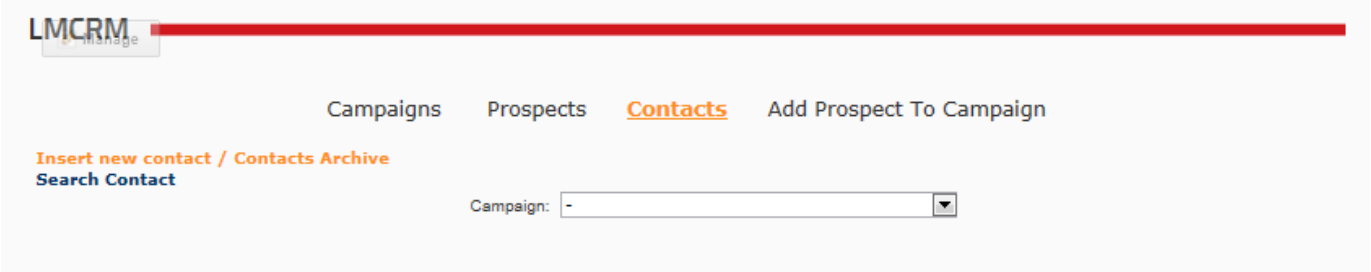

Figure 9: Contacts

3.3.1 Insert new contact / Contacts Archive

This view permits to manage contacts made to prospect/client.
Each contact can be associated to an operator. Supervisor user can view all contacts (contacts made by whatever operator and contacts not associated to an operator), while an operator can manage only his contact (created by himself or associated to him by a supervisor).

First select campaigns for which you want to show contacts. Later you can show the '**list of contact made to prospect already contacted'** or the list of **'prospect never contacted**'.
These two modality are described below:

1) **list of contact made to prospect already contacted**

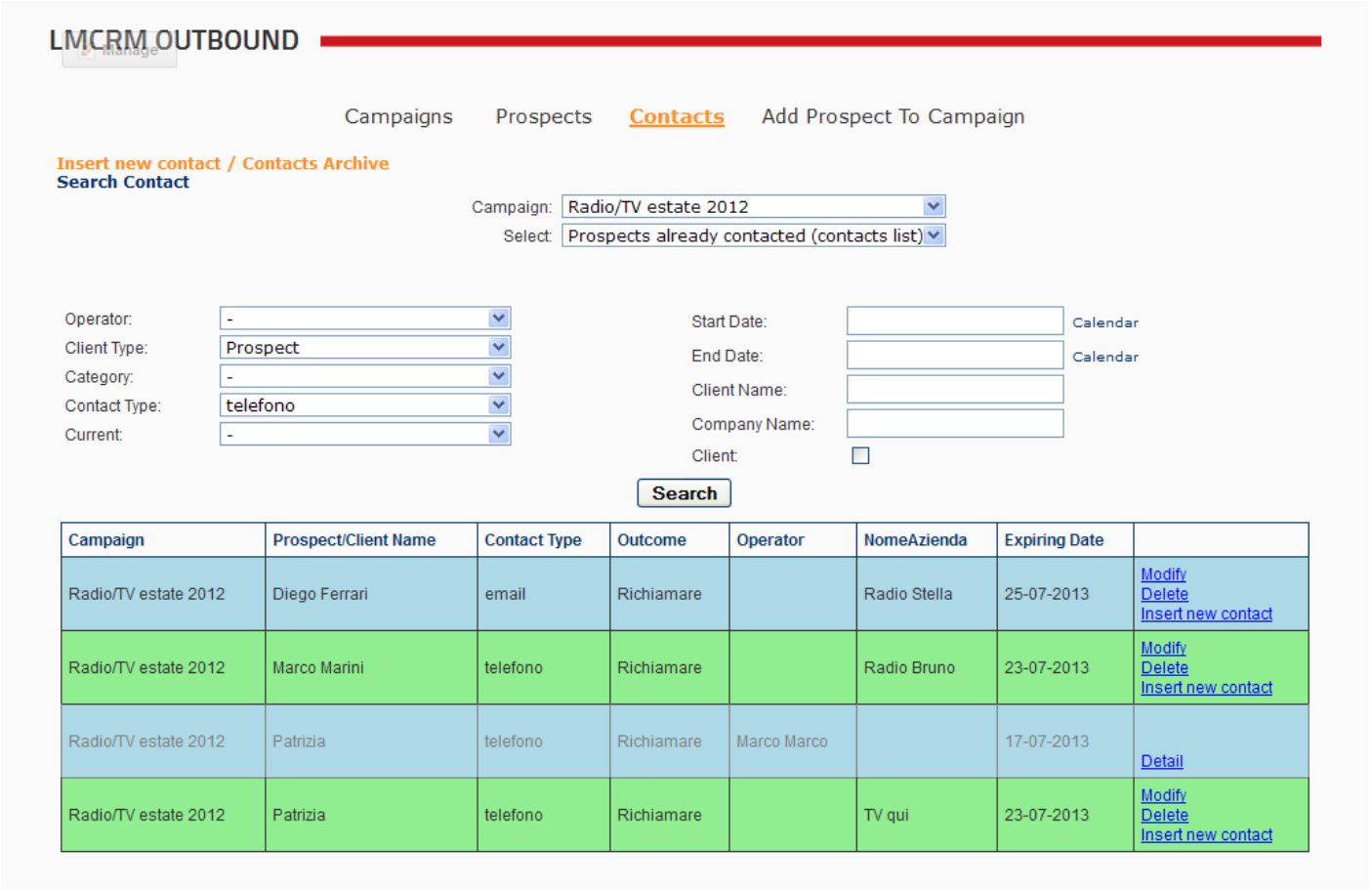
LMCRM OUTBOUND
Campaigns
Prospects
Contacts
Add Prospect To Campaign
Insert new contact / Contacts Archive
Search Contact
Campaign: Radio/TV estate 2012
Select: Prospects already contacted (contacts list)
Operator: -
Client Type: Prospect
Category: -
Contact Type: telefono
Current: -
Start Date:
End Date:
Client Name:
Company Name:
Client:
Calendar
Calendar
Search
Campaign | Prospect/Client Name | Contact Type | Outcome | Operator | NomeAzienda | Expiring Date
Radio/TV estate 2012 | Diego Ferrari | email | Richiamare | | Radio Stella | 25-07-2013 | Modify Delete Insert new contact
Radio/TV estate 2012 | Marco Marini | telefono | Richiamare | | Radio Bruno | 23-07-2013 | Modify Delete Insert new contact
Radio/TV estate 2012 | Patrizia | telefono | Richiamare | Marco Marco | | 17-07-2013 | Detail
Radio/TV estate 2012 | Patrizia | telefono | Richiamare | | TV qui | 23-07-2013 | Modify Delete Insert new contact

Figure 10: list of contact made to prospect already contacted

Figure above shows all contacts made to specified campaign.
Using following search fields to filter contacts:

- *Operator* associated to prospect.
- *Client type* (example potential client, new client, etc. etc.)

- *Category*: sector associated to prospect.
- *Contact type*: Modality to contact a prospect (example an operator can contact a prospect by e-mail, direct contact, telephone, etc. etc.)
- *Current: Current, Expiring* (Expiring means that contact closing date is approaching actual date, in other word difference between contact closing and actual date is minor than number of days specified in 'Expiring Contact Alert (days)' field in Module Settings), *Expired*.
- *Start Date, End Date:* when contact has been created, when contact expired (example: call client before date).
- *Client Name, Company Name*: Info about prospect to contact
- *Client:* checked to search prospects that are already client.

In the rightmost column you see three links:

- **Modify**: enter to modify contact. Example in following figure:

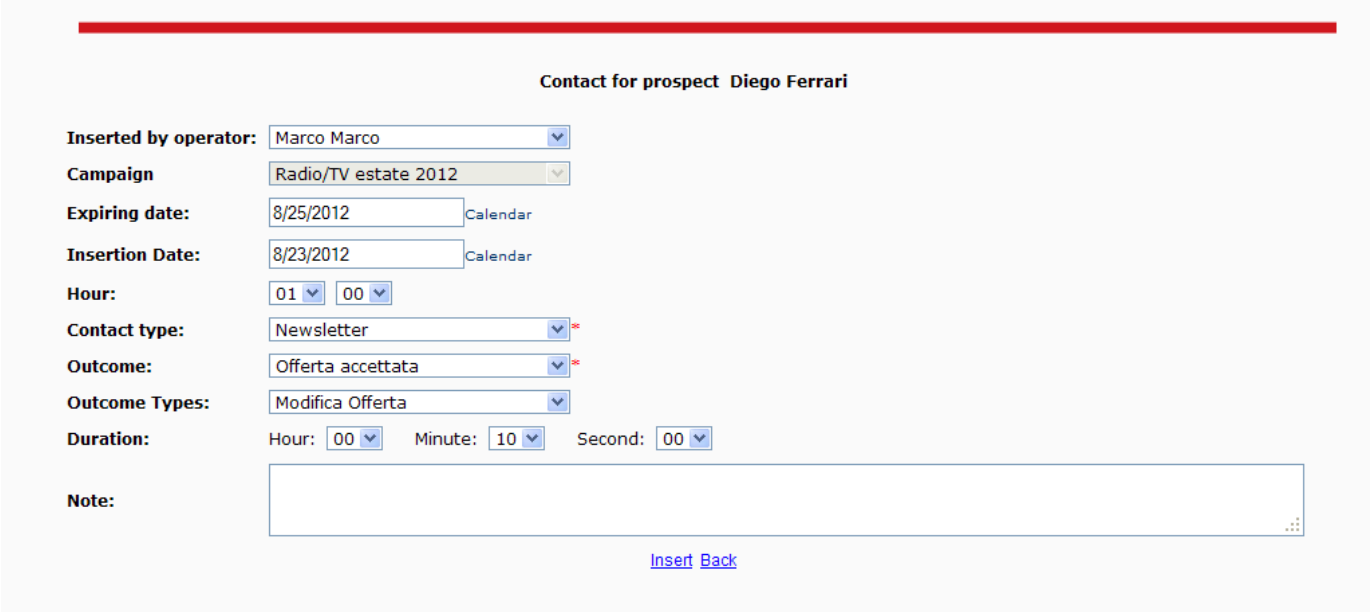

Figure 11: Modify Contact

A brief description of insertion fields:
- *Inserted by Operator*: operator user that has inserted contact or associated to the contact by a supervisor user.
- *Campaign:* campaign for which contact has been inserted (not editable).
- *Insertion Date, Expiring Date:* when contact has been created, when contact expired (example: call client before date).
- *Hour*: time at which contact has been done
- *Contact type* (mandatory): modality to contact a prospect (example an operator can contact a prospect by e-mail, direct contact, telephone, etc. etc.)
- *Outcome* (mandatory): outcome contact (example: accepted, not accepted, etc. etc.)
- *Outcome Types* (mandatory): more detailed info about Outcome.
- *Duration* (hour, minute, second): contact duration (example phone call duration)
- *Note*

All fields can be modified except for campaign. Operator can't modify who has made / is associated to contact.

- **Delete**: delete contact.

- **Insert new contact**: this view permits to insert a new contact for specified prospect. It is substantially the same of modify contact (in figure I've filled field with some example values).

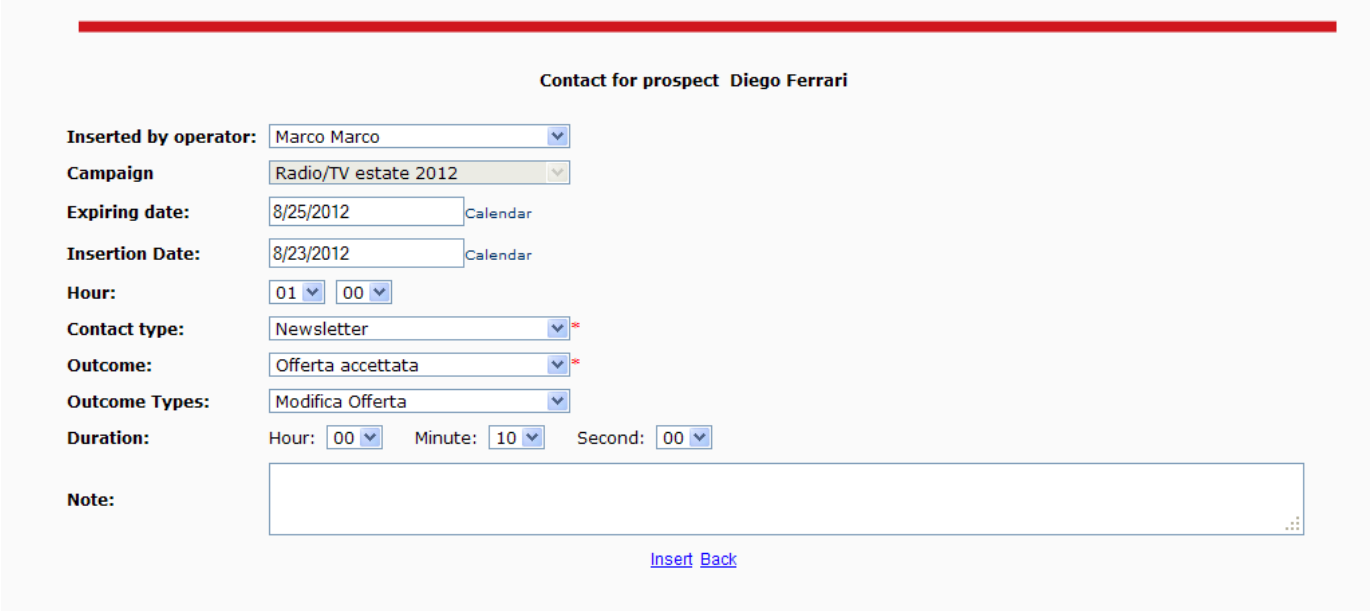

Figure 12: Insert new contact

Supervisor users can associate an operator to a contact (see '*Inserted by operator'* field), in this case specified operator is able to contact a prospect to promote a campaign.

2) prospect never contacted

Show prospect/client associated to specified campaign but not yet contacted.

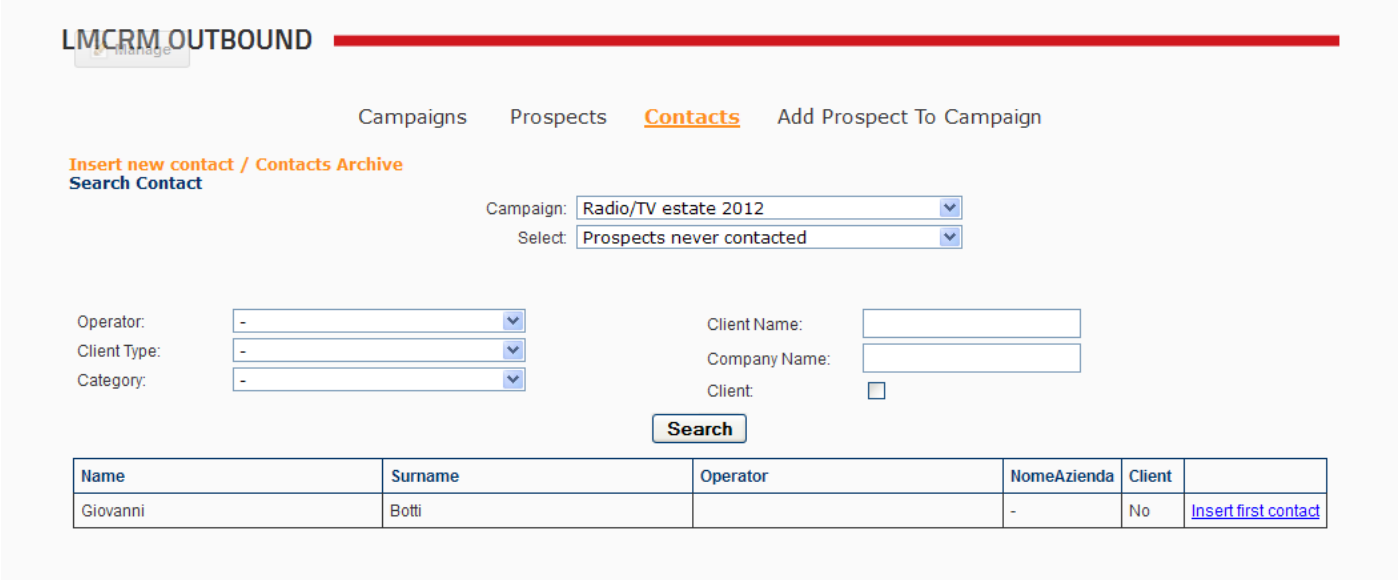

Figure 23: Prospects never contacted

Among the prospects list I can filter with following parameters:
- *Operator* to whom the prospect is associated.
- *Client type* (example potential client, new client, etc. etc.)
- *Category*: sector to which the prospect belongs
- *Client Name, Company Name*: info about prospect.
- *Client*: if checked prospect is already a client.

Insert first contact link (in the rightmost column) allows to insert the first contact for the specified prospect. The entry form is identical to the 'Insert new contact' view (figure 11). Once you enter contact, the prospect will disappear from this view.

3.3.2 Search Contact

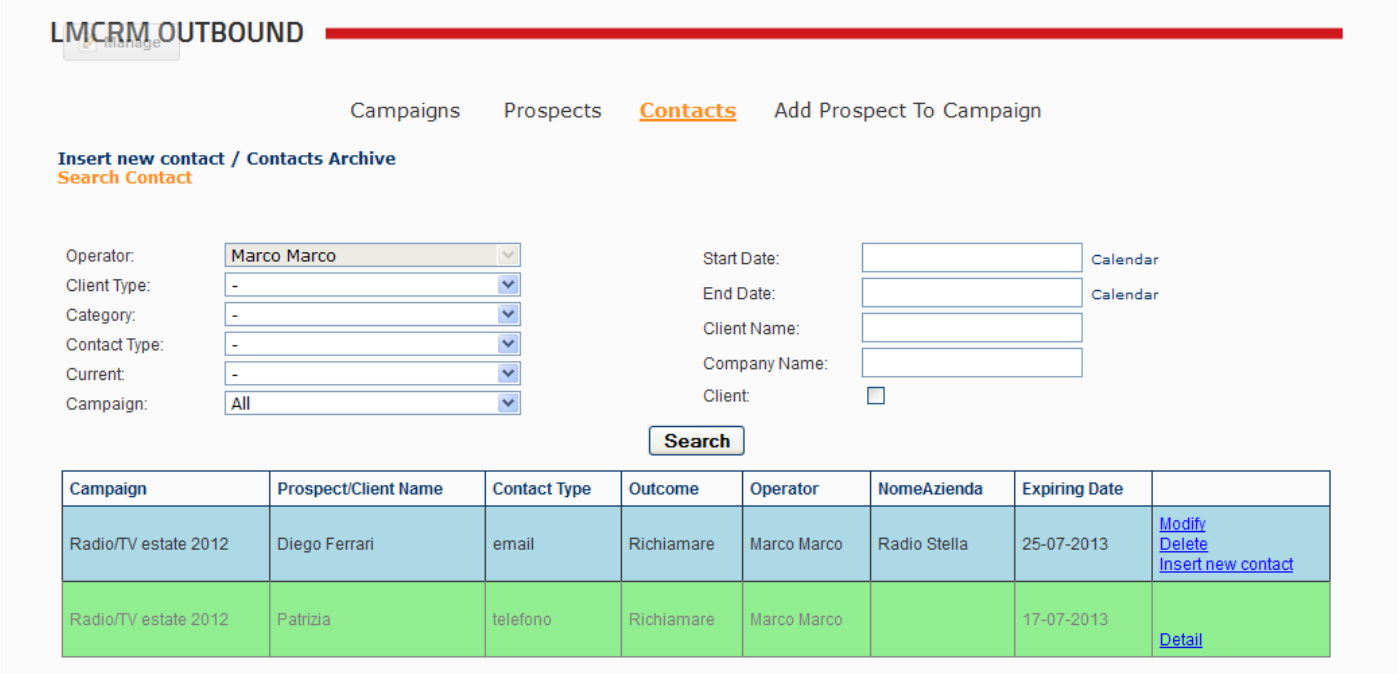

Figure 34: Search contact

This view permits to search between contacts. Each search fields are described below. Supervisor users can view all contacts while operator users can view only contact inserted by / associated to him.
- *Operator:* show contacts inserted by / associate to specified operator (or contact not associated to an operator).
- *Client type:* show contacts for a specific client type (example: potential client, new client, etc. etc.).
- *Category*: show contacts for prospects that belong to the specified category (also named sector).
- *Contact type*: modality to contact prospects (example: e-mail, direct contact, phone, etc. etc.)
- *Current: Current, Expiring* (Expiring means that closing date is approaching actual date, in other word difference between closing and actual date is minor than number of days specified in 'Expiring Contact Alert (days)' field in Module Settings), *Expired*.
- *Campaign*: for which contact has been inserted.
- *Start Date, End Date*: show contacts for which lapse of time between 'insertion date' and 'expired date' intersects 'start date' to 'end date' period (if both are specified)
- *Client Name, Company Name.*
- *To Client:* if checked, campaign is addressed to clients, otherwise it is addressed to potential clients (prospects).

Contacts in grey color are no more associated to campaign or they are expired. In this last case I can view only details.

3.4 Add Prospect To Campaing

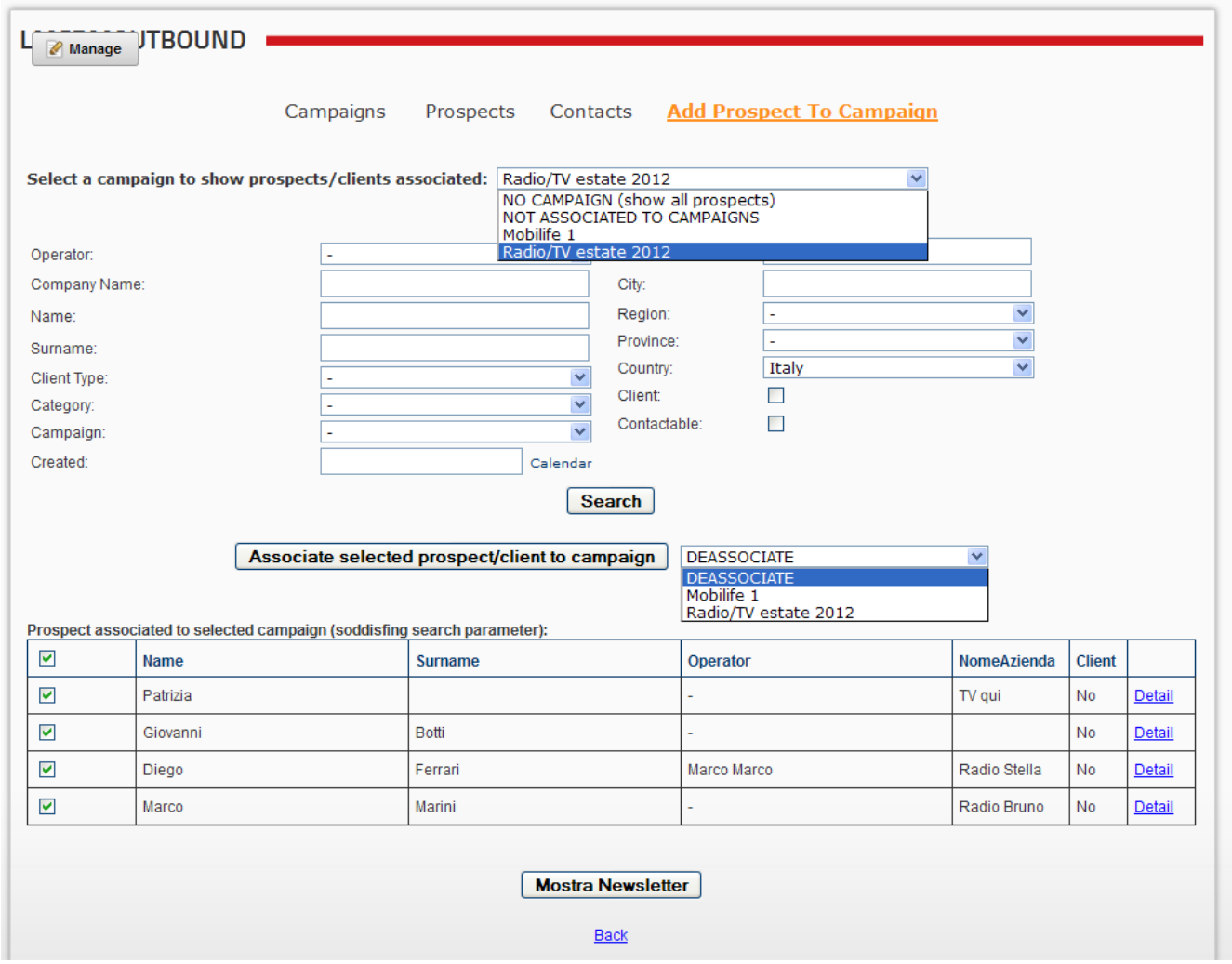

Figure 45: Associa Prospect/clienti a campagne

This view permits to:

1) Show prospect/client already associated to specified campaign:

Select a campaign from campaigns list at the top of the page.
In the list you find ‘NO CAMPAIGN (show all prospects)’ and ‘NOT ASSOCIATED TO CAMPAIGNS’: last case refers to prospect/clients not associated yet to a campaign or disassociated to all campaigns.

2) Associate one or more prospects to a specified campaign:

Select a campaign to view prospect/clients associated to it, eventually filter them. Then select (flag checkbox) prospect/client you want to associate. At last select a campaign (from the list under search button) and click '**Associate selected prospect/client to campaign'**
(use DEASSOCIATE to disassociate selected prospect/clients to the specified campaign, as described in figure 15).

After creating association prospect – campaign, you can start to insert new contacts.

3) Send an e-mail to prospects associated to a specific campaign:

Show Newsletter button shows following mask to send e-mail:

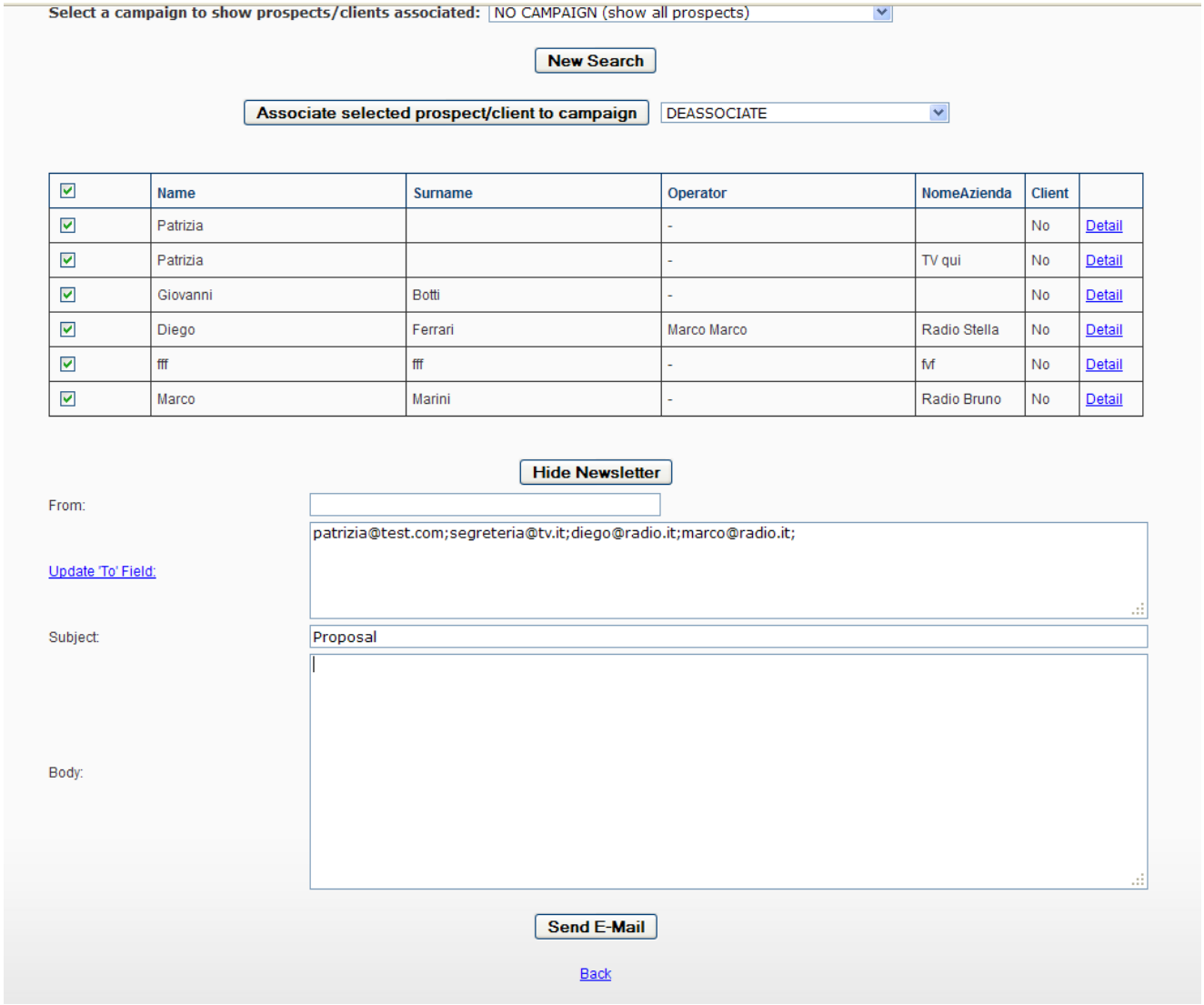

Figure 56: Show Newsletter

'Update To Field' link takes e-mail address (if exists) from selected prospect/clients. You can add more e-mail addresses to list, or delete them.
You can add a sender address. 'Send E-Mail' button will send an e-mail to all addresses in the list.

4 User Roles

Roles are two: "**Supervisore Outbound**" and "**Operatore Outbound**". Each role is a DotNetNuke role so you can associate user to roles by using usual DotNetNuke view. Roles are automatically created during module installation. Roles automatically gain 'Modify' role (to the module) during module installation.

Supervisor and operator users access to same view, only difference is that supervisor user can develop more tasks, as described below:

- '**Insert Campaign'** view: all roles can insert a campaign, only difference is that supervisor user can associate an operator to a campaign, while campaign inserted by an operator is automatically associated to operator itself.
- '**Search Campaign'** and '**General Campaign List'** view: supervisor users view all campaigns while operator users view (and search) only their campaigns.

At the same ways, supervisor can manage all contacts, while operator can manage only contacts inserted by / associated to himself.

- '**Insert Prospect'** view: each user belonging to "**Supervisore Outbound**" and "**Operatore Outbound"** roles can insert a prospect, only difference is that supervisor user can associate an operator to a prospect, while prospect inserted by an operator is automatically associated to operator itself.
- '**Search Prospect'** and '**Prospect' General List'**: supervisor users can view all prospect while operator users view (and search) only their prospect.

- "**Insert new contact / Contact Archive**", "**Search Contact**", "**Associate Prospect To Campaign**": functionality are the same, only difference is that supervisor user can view all contacts, while contacts inserted by an operator is automatically associated to operator itself. So an operator user can view only contacts related to his prospects. At last, an operator can associate to a specified campaign only his prospects.

5 Settings

Access to this view by pressing ‘Settings’ link (figure refers to DotNetNuke 6). Supervisor user must belong to ‘administrator site’ role.

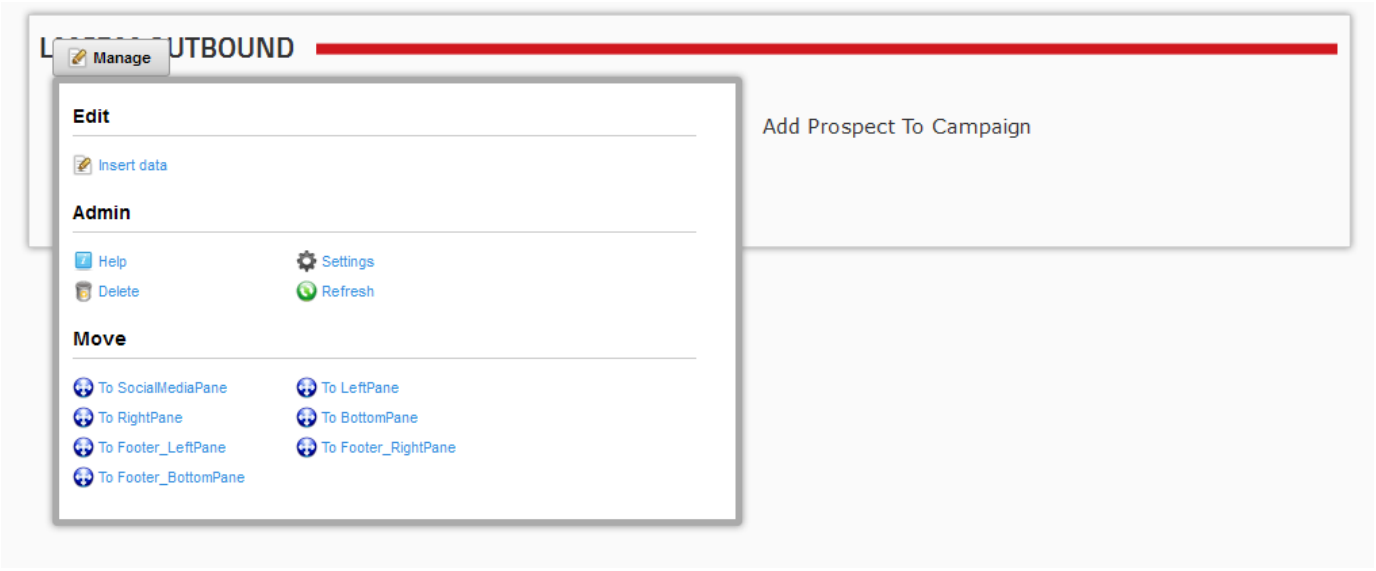

Figure 67: Access to module Settings

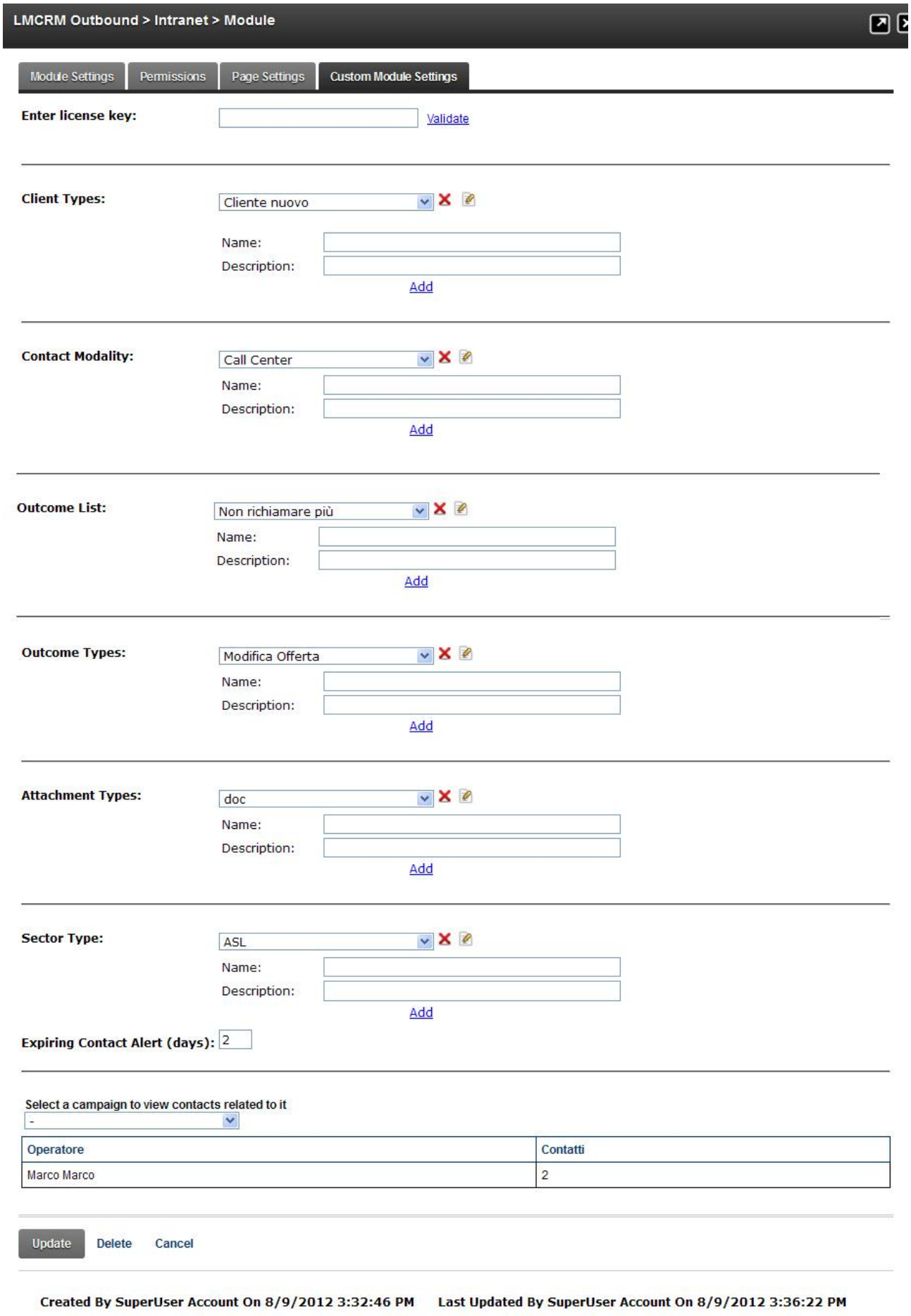
LMCRM Outbound > Intranet > Module
Module Settings
Permissions
Page Settings
Custom Module Settings
Enter license key:
Validate
Client Types:
Cliente nuovo
Name:
Description:
Add
Contact Modality:
Call Center
Name:
Description:
Add
Outcome List:
Non richiamare più
Name:
Description:
Add
Outcome Types:
Modifica Offerta
Name:
Description:
Add
Attachment Types:
doc
Name:
Description:
Add
Sector Type:
ASL
Name:
Description:
Add
Expiring Contact Alert (days): 2
Select a campaign to view contacts related to it
-
Operatore
Contatti
Marco Marco
2
Update
Delete
Cancel
Created By SuperUser Account On 8/9/2012 3:32:46 PM
Last Updated By SuperUser Account On 8/9/2012 3:36:22 PM

Figure 78: Settings

- *License Key*: you must insert a license key to use this module.
- *Client type:* list of all possible prospect/client types (example potential client, new client, etc. etc.).
- *Contact Type*: List of modalities to contact a prospect/client (example: an operator can contact a prospect/client by e-mail, by direct contact, by phone, etc. etc.)
- *Outcome*: list of all possible outcomes of a contact (example: accepted, not accepted, recall, etc. etc.)
- *Outcome Types*: list of more detailed info about outcomes (example: prospect asks for another call, prospect asks for an appointment, etc. etc.)
- *Sector type*: Prospects and Campaigns are eventually associated to a specified sector type, like merchandising type, etc. etc.
- *Attachment type*: Attachment type of files eventually associated to campaigns.
- *Expiring Contact Alert (days):* Alert operator if contact expiring date is approaching actual date (difference is minor than specified number of days).